

August 6, 2008

TO: Sherri-Ann Burke, Washington Federation of State Employees (WFSE)

FROM: Teresa Parsons
Director's Review Program Supervisor

SUBJECT: Patricia Young v. Department of Natural Resources (DNR)
Allocation Review Request ALLO-07-051

On May 27, 2008, Director's Review Investigator Kristie Wilson and I conducted a Director's review meeting at the Department of Personnel, 2828 Capitol Boulevard, Olympia, Washington, concerning the allocation of Ms. Young's position. Present at the Director's review meeting were you and Ms. Young; Tom Hoffer, Marty Graf, and Melody Helland, from the Human Resources Department at DNR; and Dennis Flynn, Assistant Division Manager, also with DNR.

Background

On June 11, 2007, Ms. Young completed a Position Review Request (PRR) form, requesting that her Construction Project Manager position (#6567) be reallocated to the Facilities Planner classification. Ms. Young's supervisor, Facilities Planner Darlena Heglund, signed the PRR on June 13, 2007. Additionally, in response to the PRR, Ms. Heglund also signed a Position Description Form (PDF) for Ms. Young's position on June 13, 2007. On June 14, 2007, DNR's Human Resources Office received Ms. Young's request for reallocation. By letter dated June 21, 2007, Human Resources Consultant Marty Graf determined the Facility Services Coordinator 2 was the appropriate classification for Ms. Young's position. Specifically, Mr. Graf concluded that Ms. Young's role was limited to space planning for existing DNR facilities, which he determined best fit the Facility Services Coordinator 2 classification.

Summary of Ms. Young's Perspective

Ms. Young asserts she has always performed the work of a Facilities Planner. While Ms. Young acknowledges there is a coordinating element to her job, she states she has been

involved in all phases of facilities planning and has been involved in negotiating space and moving entire divisions within DNR. As such, Ms. Young contends she has been involved in the planning stages for development or acquisition, has performed space planning and helped with modifications, including restructuring the inside of a building and working with contractors. Ms. Young asserts the planning phase of her job requires a lot of thought that includes planning for future expansion and usage. Ms. Young believes the work involved with the modification of existing space involves the same level of planning and development as the physical modifications of building structures such as walls and floors. Ms. Young contends that the duties assigned to her position fit the Facilities Planner classification.

Summary of DNR's Reasoning

DNR describes Ms. Young's role as a space planner. In that capacity, DNR asserts Ms. Young modifies office cubicles and systems furniture within the DNR building but does not acquire state facilities or make modifications to the physical structure of buildings. While DNR agrees that Ms. Young, along with her supervisor, considers options as part of the preplanning process, the department argues Ms. Young's role involves data collection, such as the number of people assigned to a particular area or square footage needs. DNR contends Ms. Young's position supports a Facilities Planner position but does not assist in all phases of planning, development, acquisition, modification, or expansion of DNR structures and related facilities. DNR believes the Facility Services Coordinator 2 classification accurately describes the work performed by Ms. Young during the time relevant to this review.

Director's Determination

This position review was based on the work performed for the six-month period prior to June 14, 2007.

As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review meeting, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Young's assigned duties and responsibilities, I conclude her position is properly allocated to the Facility Services Coordinator 2 classification.

Rationale for Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and

responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

From approximately 2002 to 2004 Ms. Young was assigned to a Facility Services Coordinator 2 (FSC 2) position (previous position #5595). In 2004, Ms. Young applied for and accepted a new position as a Construction Project Manager (CPM) (position #6567). It is position #6567 that is the subject of this review. At the time Ms. Young began working in position #6567 as a CPM, there was no Position Description Form (PDF) outlining the CPM duties and no PDF for the CPM position was ever completed. Both parties agree that Ms. Young continued to perform the same duties after accepting the CPM position. However, Ms. Young asserts she always performed the duties of a Facilities Planner, while DNR asserts that she continued to perform FSC 2 duties even after being promoted to the CPM position. Neither party believes the CPM is the appropriate classification.

In June 2007, Ms. Young completed a PRR describing her duties. Ms. Young's supervisor, Facilities Planner Darlena Heglund, disagreed with Ms. Young's description of duties (Exhibit A-3, Supervisor Review). Ms. Heglund then completed a PDF detailing the assignment of work and proposing the Facilities Coordinator II classification (Exhibit A-9). When considering the assignment of work, I reviewed the PRR, Supervisor's Review, and PDF. I also considered the fact that Ms. Young was previously assigned to an FSC 2 position and that both parties agreed the assignment of work had not changed.

On the PRR (Exhibit A-3), Ms. Young describes her position's purpose as follows:

To assist . . . in all phases of planning and development, and construction of buildings and interior office space for the Natural Resources Building (NRB) and Regions of DNR; acquisition of space and furnishings, establishing and maintaining service contracts; evaluating DNR leased and owned properties utilization; modification of existing spaces; providing efficiencies to function, design, and expansion or modifications to structures (interior and exterior); providing planning and Architectural Drafting and Design, Auto CAD drawings and related facilities planning to utilized by DNR.

However, in response, Ms. Heglund indicated Ms. Young's position was not responsible for planning and developing the construction of buildings or acquiring new space. Additionally, Ms. Heglund explained that Ms. Young's position was responsible for coordinating the use of contracts but that the contracts were already in place and Ms. Young was not involved in the creation of the contracts. Further, Ms. Heglund indicated Ms. Young's position was not responsible for major building alterations and did not have budget authority but that her position had been involved in multiple furniture configurations involving systems furniture and that she was responsible for estimating

projects, reviewing invoices, and keeping projects on budget. Ms. Heglund described the main job duties assigned to Ms. Young's position as follows:

- Assisting with space planning;
- Collecting data and entering data to assist others to determine appropriate use of existing structures;
- Analyzing facility space needs;
- Working with vendors under state contracts;
- Preparing non-technical reports and providing graphical illustrations with the majority being prepared for agency use.
- Supporting management decisions to change existing space boundaries already leased by DNR and assisting others in the Facilities Section by coordinating systems furniture reconfigurations and, at times, minor construction, which is approved by General Administration as the building owner.

The duties described above are consistent with Assistant Division Manager Dennis Flynn's characterization of work during the Director's review conference. In addition, the work described above is similar to the work Ms. Young describes on the PRR, including the following:

- Providing facility planning assistance to existing DNR facilities, evaluating current usage of DNR spaces and making recommendations to maximize space and functions;
- Forecasting future needs and gathering facilities information needed to determine future growth requirements and updating database, providing management with detailed reports;
- Serving as contractor point of contract;
- Making recommendations on space allocations;
- Preparing a variety of technical reports and graphic illustrations.

The PDF summarizes the majority of duties as coordinating furniture reconfigurations and general maintenance work in the NRB, evaluating requests by agency customers (facility tenants) to estimate, plan, coordinate and schedule reconfiguration and maintenance projects.

When comparing the assignment of work to the Construction Project Manager classification, I agree Ms. Young's assigned duties do not fit the definition of coordinating, directing and reviewing the development of designs and specifications by private design firms for the construction of state buildings or directing the planning, scheduling, project and cost control of complex building construction projects.

The Facilities Planner definition states that positions assist “in all phases of planning the development, acquisition, modification, and expansion of structures and related facilities for utilization by State government.” While Ms. Young has performed space planning and internal modifications and restructuring of space inside the DNR building, as well as gathering information for future expansions within the building, she has not been tasked with the development, acquisition, modification, and expansion of building structures. Ms. Young’s role, at the time relevant to this review, was to support a Facilities Planner position (Ms. Heglund’s) by gathering information, acting as a point of contact with contractors, and analyzing the utilization of space and future needs within the DNR building the majority of the time. Therefore, the Facilities Planner is not the best fit for Ms. Young’s position.

The Facility Services Coordinator 2 definition reads as follows:

In the Work Management Center of the Department of General Administration, plans, coordinates, estimates and schedules maintenance and construction project requests in excess of \$1,000.00.

While I acknowledge that Ms. Young is not an employee of the Department of General Administration, the work described in the definition is a better fit for her assignment of work. For example, on the PDF, Ms. Heglund describes 30% of Ms. Young’s assigned duties as estimating material and man power to assist in development of project budgets over \$1,000.00 and 20% as reviewing requests by agency customers and acting as the Facilities Point of Contact for coordinating reconfigurations and deliveries of new materials to job site.

While examples of work do not form the basis for an allocation, they lend support to the work envisioned within a classification. The typical work identified in the FSC 2 class specification most in line with Ms. Young’s assignment of work includes the following:

- Evaluates requests by agency customers (facility tenants) to estimate, plan, coordinate and schedule maintenance and construction activities;
- Coordinates, estimates and plans with customers on facility management organization related work requirements;
- Using project documents, inspects job site, communicating with requestor to determine the exact intent of work;
- Estimates material and work hours necessary to accomplish project; coordinates ordering of unique project material;
- Issues appropriate documentation to units of facility maintenance organization for action; monitors scheduling between units for completion;

- Initiates and supervises minor public works contracts (in this case on site supervision of contractors as required), including inspections and management of contract projects.

While it is clear Ms. Young is a highly capable individual with invaluable knowledge about facilities planning, a position's allocation is not based on an evaluation of performance or an individual's ability to perform higher-level work. Rather, it is based on the majority of work assigned to a position. On a best-fit basis, the Facility Services Coordinator 2 classification best describes Ms. Young's position #6567.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

Enclosure: List of Exhibits